

Review of triazine strategy from a global perspective



by Willy Maurer

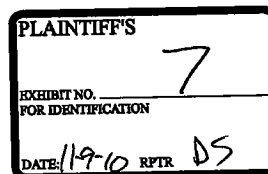
Global Product Manager for triazines in Basel

Mar 22, 2005, Greensboro

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Atrazine / Terbutylazine – YTD Variance vs Last Year (02/05)

	2004 YTD	2005 YTD	Variance				Status
			Volume	Price	Cur	Total	
USA	17.5	17.7	0.1	0.1	-	0.2	●
Brazil	7.0	2.7	-5.1	0.9	-	-4.2	●
Australia	2.4	2.7	0.6	-0.3	0.1	0.3	●
Germany	0.0	1.3	1.2	-0.0	0.1	1.3	●
Japan	0.5	0.6	0.1	-0.0	0.0	0.1	●
Hungary	0.1	0.4	0.3	0.0	0.0	0.3	●
Serbien Montenegro	0.8	0.3	-0.5	0.0	0.0	-0.5	●
Rest of the World	3.6	1.8	-1.8	-0.1	0.1	-1.8	●
Total	31.8	27.5	-5.2	0.6	0.3	-4.3	●

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Atrazine / Terbutylazine – YTD Variance vs Budget (02/05)

	B2005 YTD	2005 YTD	Variance				Status
			Volume	Price	Cur	Total	
USA	21.4	17.7	-4.0	0.2	-	-3.8	●
Brazil	2.1	2.7	0.1	0.5	-	0.6	●
Australia	1.5	2.7	1.0	-0.1	0.3	1.2	●
Germany	3.8	1.3	-3.2	0.5	0.1	-2.6	●
Japan	0.4	0.6	0.2	-0.0	0.0	0.2	●
HQ Industrial Sales	0.8	0.4	-0.3	-0.1	0.0	-0.4	●
Hungary	0.1	0.4	0.2	0.0	0.0	0.3	●
Rest of the World	2.5	1.7	-0.9	0.0	0.1	-0.8	●
Total	32.6	27.4	-6.9	1.0	0.6	-5.2	●

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Atrazine YTD end of February

	2004	2005	2005	CER Var. %	YTD	YTD	YTD CER	Status
Top Countries	Actual	Budget	LE	LE vs	Actual	Budget	Var. %	vs.
	(\$M'S)	(\$M'S)	(\$M'S)	Budget 2004	(\$M'S)	(\$M'S)	Act. vs Bud	Budget
USA PP Professional Pl	65.8	56.2	0.0	-61.8%	5.7	17.7	-67.6%	●
Brazil	25.1	21.5	0.0	13.4%	2.7	2.1	27.0%	●
Mexico	10.0	10.2	0.0	-3.2%	0.2	0.0	308.6%	●
Australia	10.0	10.0	0.0	4.4%	2.7	1.5	60.0%	●
USA NFC Northern Fir	8.4	7.2	0.0	1.4%	1.4	1.9	-26.0%	●
USA PM Prairie & Mo	6.6	6.2	0.0	-2.7%	0.4	0.4	5.9%	
Argentina	4.5	4.2	0.0	3.2%	0.0	0.0	0.0%	
USA SFC Southern Fiel	3.1	3.8	0.0	-13.3%	0.6	0.7	-18.5%	
USA HORT Horticultu	2.9	2.6	0.0	-5.6%	0.8	0.8	0.3%	
Venezuela	1.6	1.8	0.0	-40.1%	0.0	0.5	-100.0%	
Japan	1.7	1.6	0.0	1.6%	0.6	0.4	51.3%	
Guatemala	1.0	1.4	0.0	-72.8%	0.0	0.0	0.0%	
Thailand	1.5	1.4	0.0	5.8%	0.2	0.2	3.1%	
Canada	1.6	1.4	0.0	38.2%	0.0	0.0	0.0%	
South Africa	0.6	1.3	0.0	-49.2%	0.1	0.0	2165.2%	
Others	10.4	7.4	-	428.3%	10.4	1.9	450.2%	
Total	154.9	138.3	-	-1.7%	25.7	28.1	-10.1%	○

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Terbuthylazin YTD end of February

	2004	2005	2005	CER Var. %	YTD	YTD	YTD CER	Status
Top Countries	Actual	Budget	LE	LE vs	Actual	Budget	Var. %	vs
	(\$M'S)	(\$M'S)	(\$M'S)	Budget 2004	(\$M'S)	(\$M'S)	Act vs Bud	Budget
Germany	1.0	3.8	0.0	-16.3%	1.3	3.8	-70.2%	●
South Africa	3.7	2.7	0.0	15.6%	0.0	0.5	-99.7%	●
Portugal	1.2	1.9	0.0	-25.1%	0.3	0.1	197.6%	●
Hungary	0.4	0.5	0.0	-8.8%	0.1	0.1	12.6%	
USA PP Professional Pl	0.2	0.4	0.0	-29.5%	0.0	0.0	0.0%	
Croatia	0.0	0.1	0.0	-100.0%	0.0	0.1	-100.0%	
Lebanon	0.0	0.0	0.0	0.0%	0.0	0.0	-100.0%	
Switzerland	0.1	0.0	0.0	0.0%	0.0	0.0	0.0%	
Spain	1.6	0.0	0.0	0.0%	0.0	0.0	0.0%	
France	0.0	0.0	0.0	0.0%	0.0	0.0	0.0%	
United Kingdom	0.0	0.0	0.0	0.0%	0.0	0.0	0.0%	
Greece	0.1	0.0	0.0	0.0%	0.1	0.0	0.0%	
Nigeria	0.0	0.0	0.0	0.0%	0.0	0.0	0.0%	
USA	0.0	0.0	0.0	0.0%	0.0	0.0	0.0%	
HQ Industrial Sales	0.7	0.0	0.0	0.0%	0.0	0.0	0.0%	
Others	0.1	-	-	#DIV/0!	-	-	#DIV/0!	
Total	9.4	9.5	-	8.9%	1.8	4.5	-64.3%	●

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Simazin YTD end of February

Top Countries	2004	2005	2005	CER Var. %	YTD	YTD	YTD CER	Status
	Actual (\$M'S)	Budget (\$M'S)	LE (\$M'S)	LE vs Budget 2004	Actual (\$M'S)	Budget (\$M'S)	Var. % Act vs Bud	
Australia	8.6	8.9	0.0	-13.4%	1.5	2.6	-47.2%	●
USA HORT Horticultu	4.0	4.1	0.0	-11.7%	0.9	0.9	-8.5%	●
USA NFC Northern Fl	4.1	3.7	0.0	-1.4%	0.6	0.7	-18.2%	●
USA PP Professional P	3.5	2.3	0.0	-75.6%	0.1	0.3	-65.9%	
Japan	2.4	2.1	0.0	-3.6%	0.3	0.3	2.3%	
USA SFC Southern Fiel	0.4	0.5	0.0	-9.4%	0.1	0.1	16.4%	
USA PM Prairie & Mo	0.4	0.4	0.0	-34.9%	0.0	0.1	-90.7%	
Chile	0.5	0.4	0.0	-2.3%	0.0	0.0	216.8%	
Canada	0.3	0.3	0.0	1.0%	0.0	0.0	0.0%	
Switzerland	0.1	0.0	0.0	26.4%	0.0	0.0	-39.9%	
South Korea	0.0	0.0	0.0	-11.4%	0.0	0.0	0.0%	
Germany	0.0	0.0	0.0	0.0%	0.0	0.0	0.0%	
United Kingdom	0.0	0.0	0.0	0.0%	0.0	0.0	0.0%	
USA	0.0	0.0	0.0	0.0%	0.0	0.0	0.0%	
Uruguay	0.0	0.0	0.0	0.0%	0.0	0.0	0.0%	
Others	-	-	-	#DIV/0!	0.7	-	#DIV/0!	
Total	24.3	22.7		-5.9%	4.2	5.0	-20.1%	●

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Triazines are critical to the business



- We need atrazine to secure our position in the corn market place: without atrazine we can not defend and grow our business in USA
- 45% of all Syngenta corn herbicide sales will still depend on triazines in 2009 (342 M\$ out of 752M\$)
- Atrazine / Terbutylazin are critical mixing partners for our „high value“ corn brands and corn strategy
- 55% of the sales of Syngenta's lead a.i. mesotrione will depend on triazines in 2009 (188 M\$ out of 340M\$)
- The cumulated sales of all products containing atrazine is forecasted to be > 300 M\$ in 2009

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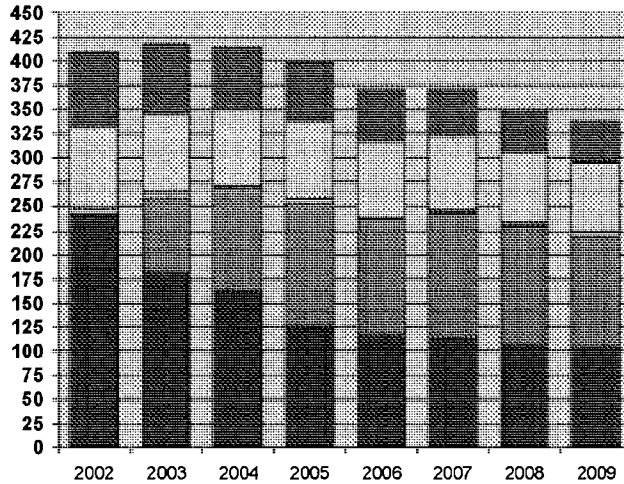
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Atrazine Sales Forecast

Sympact final cut 2004



M\$



Lead Active:

- ATR tech.
- ATR solo & mixes*
- Terba
- Ametryn
- Mesotrione
- S-Metolachlor

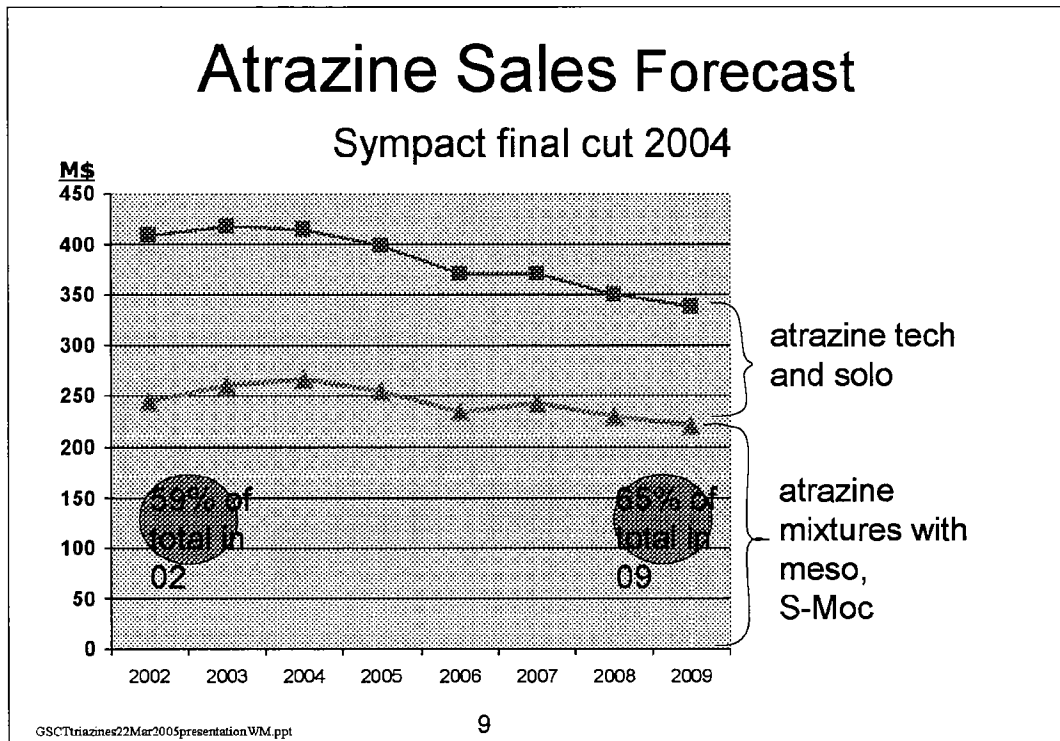
* atr + simazine

* atr + dicamba

* atr + terbutryn

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Key strategic elements



- Defend atrazine to make it sustainable outside Europe, preserve regulatory position via vigorous stewardship
- Follow a volume strategy for atrazine. Increase atrazine tech sales in order to stop volume decrease and re-gain volumes from generic competition
- Reduce production costs at St Gabriel (through cost saving project and redesign of supply chain elements) to guarantee a cost effective atrazine source
- Switch from atrazine to terbuthylazin in Europe and strictly restrict recommendations to the safe uses only (GFP programs) to maximise the chance to get it on Annex 1
- Focus marketing efforts on mixtures to maximise sales and profit of new brands, to compensate for the low profit of atrazine tech

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How to implement the strategy:

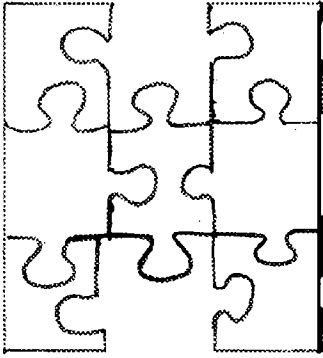
1. we reduce the supply price of atrazine tech to recuperate market share from the generics and regain volumes
2. the increase of volumes (and other triazine redesign activities) allows a substantial reduction of the production costs of atrazine
3. we maintain / increase the selling price of our new brands to maximise the gross profit of the mixtures
4. the loss of gross profit on atrazine tech is compensated by the increase of gross profit on the mixtures

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Global commercial triazine strategy

**like a puzzle: some pieces in place others
still missing !!**



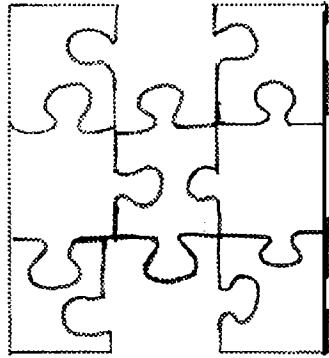
pieces in place:

- Syngenta is committed to preserve regulatory position on atrazine
- new ready mixtures containing meso and/or S-MOC + triazines are introduced
- mixes of glyphosate + atrazine are being developed
- need for atrazine in RR corn environment is confirmed
- customers interested to purchase more atrazine tech from Syngenta have been identified
- possibilities to reduce production costs identified

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Global commercial triazine strategy

**like a puzzle: some pieces in place others
still missing !!**



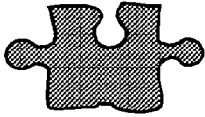
2 missing pieces:

-guarantee increase
of volume of tech

-stabilize / grow GP

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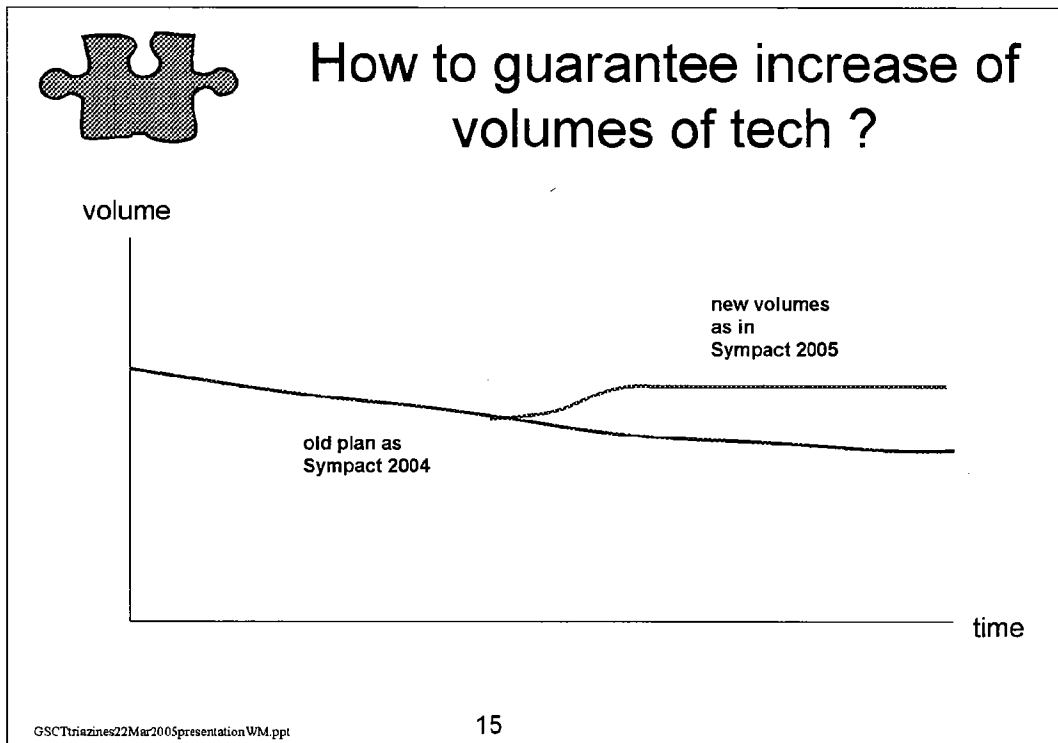
How to guarantee increase of volumes of tech ?

- we need to finalize atrazine mid-long term agreements with third party companies**
- we need to cover fluctuations of raw material costs in the agreements**
- we need to include these new atrazine volumes in Sympact 05**

- we also need to increase the volumes of terbuthylazin tech**

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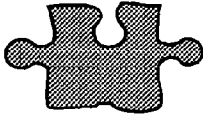


How to guarantee increase of volumes of tech ? progress made

- New global atrazine supply agreement with BASF close to be finalized
- Negotiations for supply of atrazine with DOW underway
- US atrazine supply contract with BAYER signed in 2004
- New terbuthylazin European supply agreement with BASF signed in 2004
- New negotiations for supply of terbuthylazin to Monsanto Europe have just started

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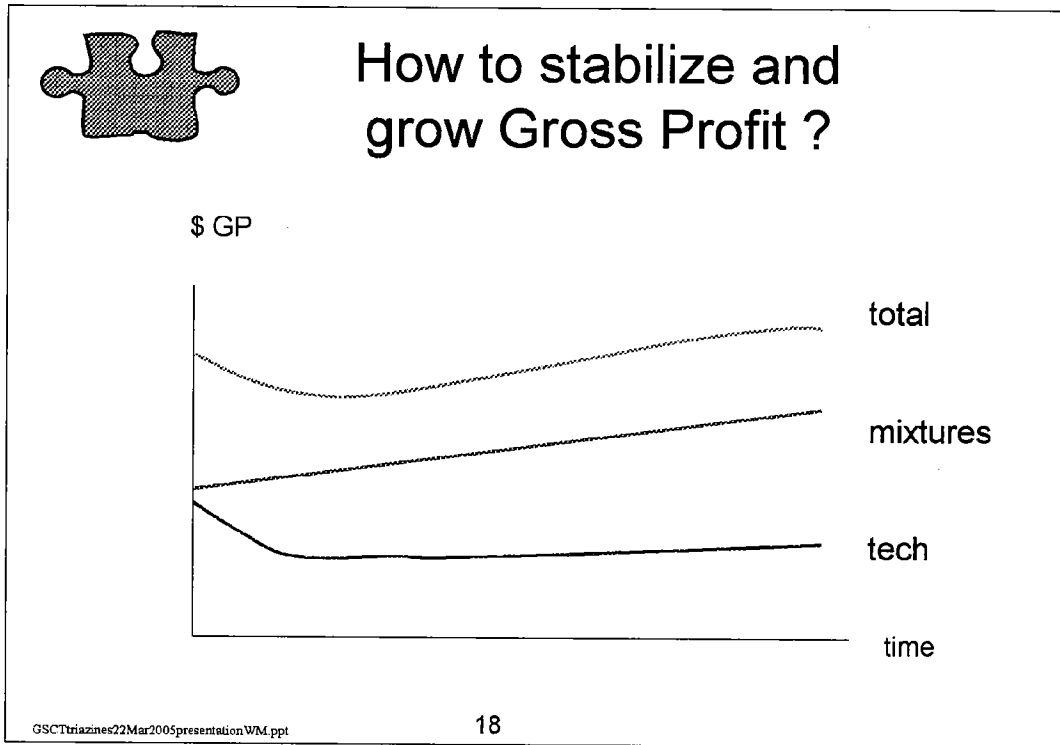
How to stabilize and grow Gross Profit ?

- we need to fix a gross profit target for each ready mix containing atrazine in \$ and %
- we need to fix a GP target for the atrazine tech in \$
- we need transparency of the GP expectations

- we also need to watch the GP of Aatrex solo and avoid price erosion

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Issues that need focus

- Some supply agreements like the atrazine BASF agreement will be global, worldwide. Negotiations are therefore done from Basel+US and not in individual countries. (needs transparency of what countries are doing see Mexico)
- Intensify contacts with KAM for private label sales. How is this process running ?
- Continue stewardship and monitoring programs to check residues of terbutylazin are < 0.1 ppb
- Keep dialogue with generics to eliminate the remaining non safe uses of terbutylazin (solo uses, perennials)

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2 new projects:

- supply of some volumes of terbuthylazin tech from Oxon.
~ 250 tons in 2005 (to formulate TBA+S-MOC), 500 tons in 2006, 500 tons in 2007

reason:

part of the deal to have Oxon abandoning non safe uses of tba in Europe

- swap atrazine between Syngenta and Albaugh.

Syngenta to sell atrazine to Albaugh in USA







Atanor to sell atrazine to Syngenta in Argentina

reason:

gross profit of atrazine 500SC in Argentina extremely low. To swap would allow to save transport and import tax

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Global demand for triazines worldwide long term

<u>product</u>	<u>trend</u>	<u>reason</u>
atrazine		volume will tend to decline because of eroding rate per acre
terbuthylazin		volume may grow in Europe, assuming it gets Annex 1 listed in 2007-2008
simazin		volume will decline
ametryn		volume will grow, because of forecasted increase of sugarcane area in Brazil
prometryn		volume will stay outside of Europe
terbutryn		volume will decline

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Summary: where do we want to be ?



- Have long term supply agreement in place for atrazine and terbutylazin tech
 - Keep freedom to operate with atrazine
 - Make terbutylazin sustainable in Europe
 - Maximise sales and profit of new brands with MESO and /or S-MOC = LUMAX, LEXAR, CALARIS and GARDO GOLD
- as well as new EXPERT, MESPert

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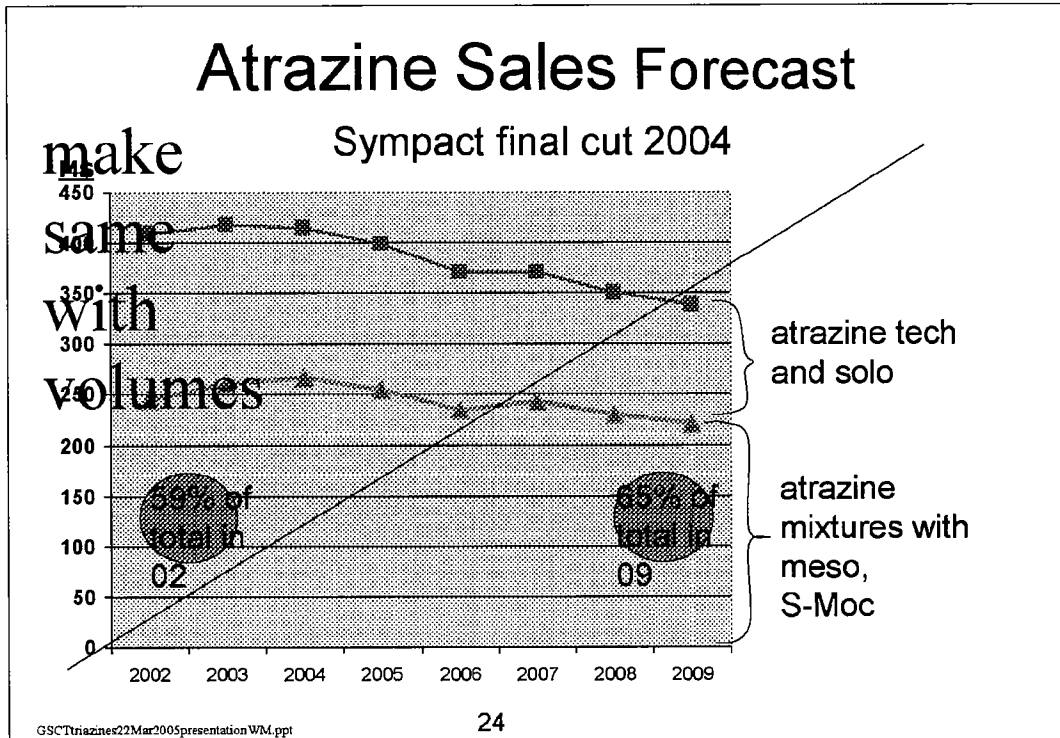
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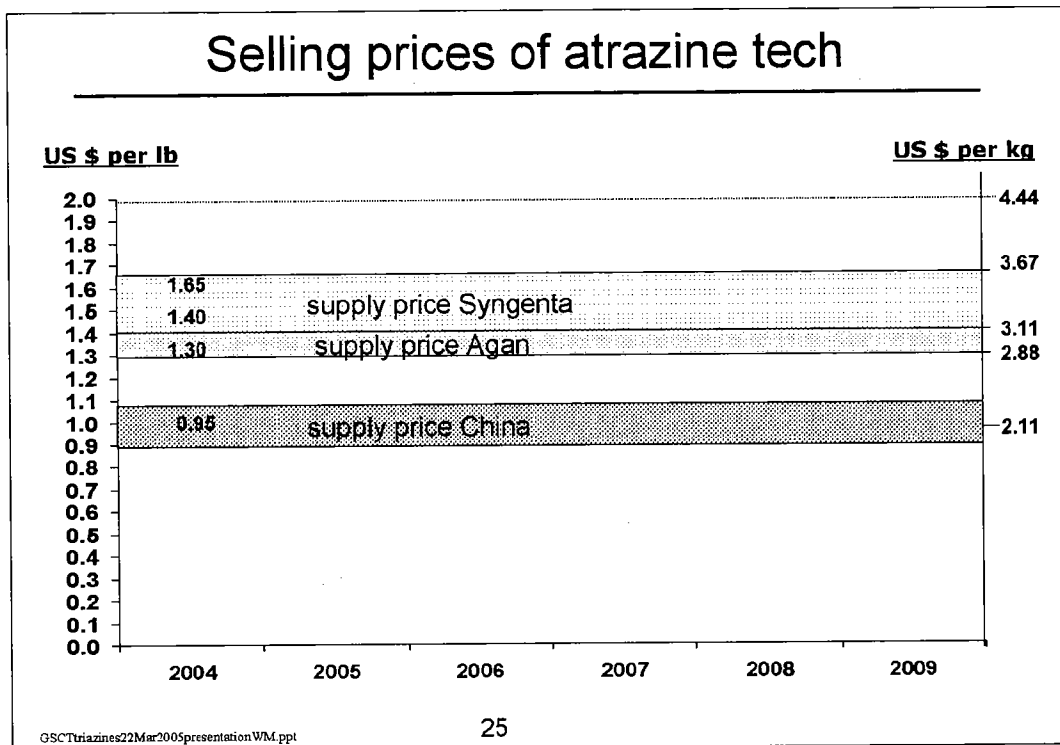
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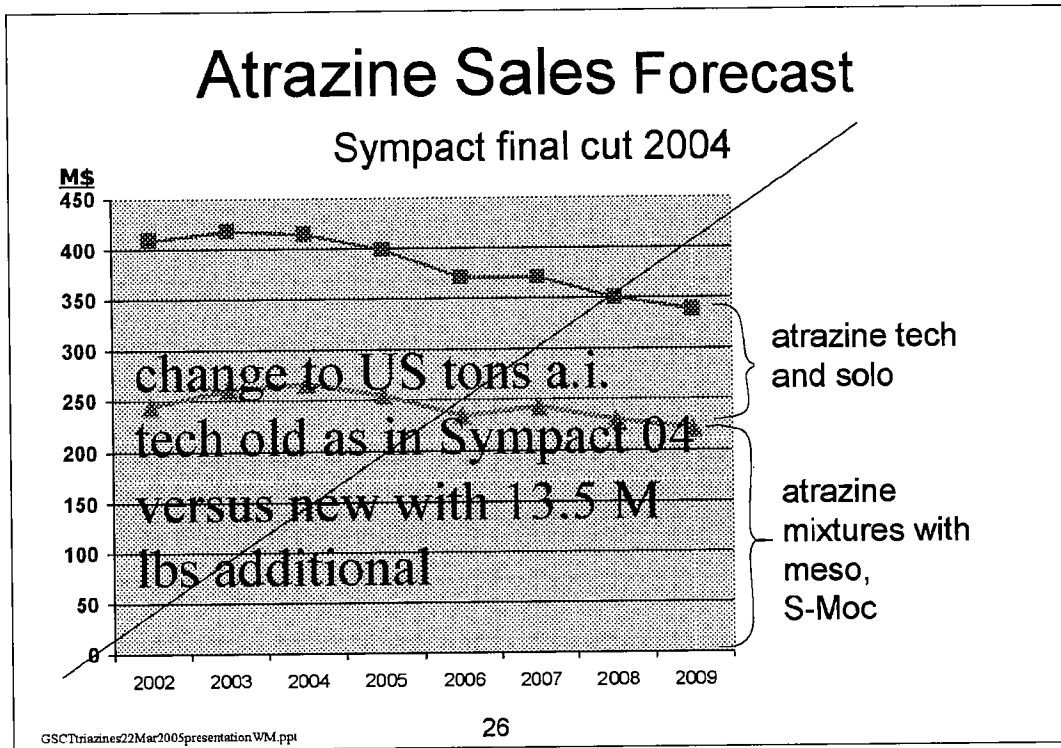
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Ametryn YTD end of February

	2004	2005	2005	CER Var. %	YTD	YTD	YTD CER	Status
	Actual	Budget	LE	LE vs	Actual	Budget	Var. %	vs.
Top Countries	(\$M'S)	(\$M'S)	(\$M'S)	Budget 2004	(\$M'S)	(\$M'S)	Act vs Bud	Budget
Mexico	7.5	7.3	0.0	-4.0%	0.5	0.2	133.4%	○
Brazil	4.6	5.9	0.0	-50.0%	0.5	1.9	-71.7%	●
Cuba	1.5	1.8	0.0	-24.5%	0.0	1.7	-100.0%	●
USA SFC Southern Fiel	1.0	1.2	0.0	-4.7%	0.0	0.0	0.0%	
Guatemala	0.7	1.1	0.0	-70.3%	0.0	0.0	0.0%	
Colombia	1.0	0.8	0.0	48.2%	0.1	0.1	21.7%	
USA HORT Horticulti	0.6	0.6	0.0	23.2%	0.2	0.2	-20.1%	
Ecuador	0.3	0.5	0.0	-7.3%	0.1	0.0	0.0%	
Sudan	0.7	0.4	0.0	238.6%	0.0	0.0	0.0%	
Thailand	0.7	0.2	0.0	0.2%	0.0	0.2	-100.0%	
Venezuela	0.0	0.2	0.0	-21.6%	0.0	0.0	0.0%	
Peru	0.1	0.2	0.0	-41.6%	0.0	0.0	18.5%	
Malaysia	0.3	0.2	0.0	1.2%	0.0	0.0	-10.1%	
Vietnam	0.1	0.1	0.0	-1.0%	0.0	0.0	14.9%	
Argentina	0.3	0.1	0.0	-9.1%	0.0	0.0	0.0%	
Others	3.6	1.0	-	62.7%	0.2	0.2	-5.1%	
Total	21.1	21.7	-	-11.8%	1.7	4.6	-64.2%	●

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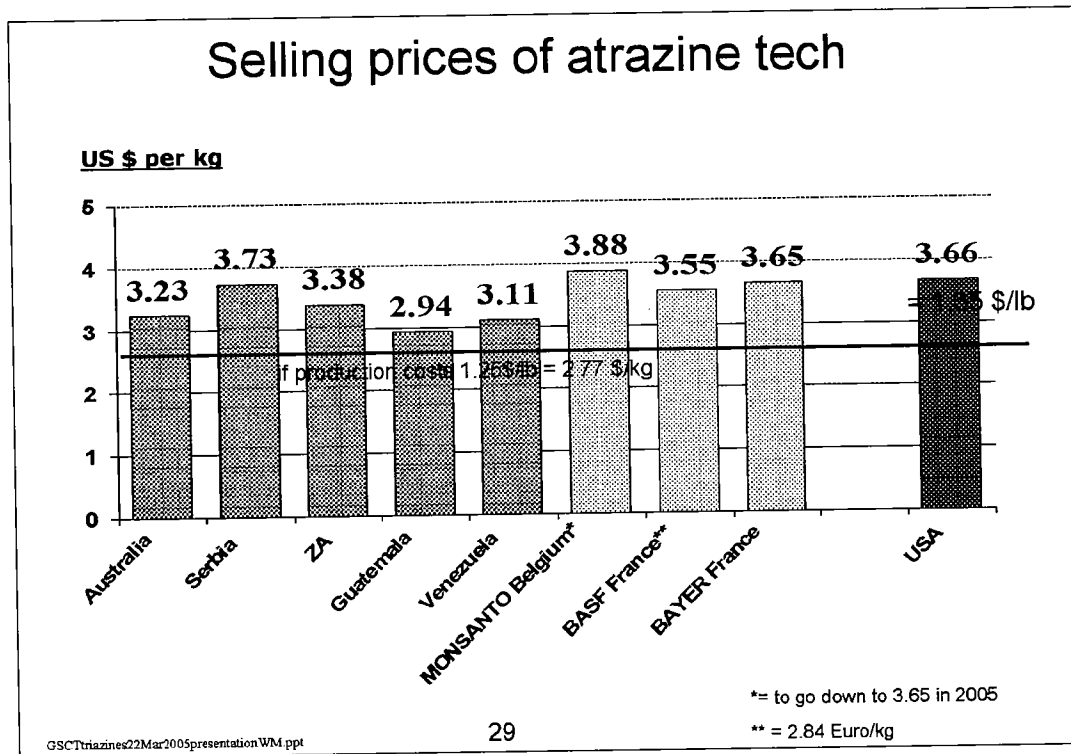
Prometryn YTD end of February

	2004	2005	2005	CER Var. %	YTD	YTD	YTD CER	Status
Top Countries	Actual	Budget	LE	LE vs	Actual	Budget	Var. %	vs.
	(\$M'S)	(\$M'S)	(\$M'S)	Budget 2004	(\$M'S)	(\$M'S)	Act vs Bud	Budget
Brazil	0.0	2.7	0.0	-100.0%	0.0	0.2	-100.0%	●
USA SFC Southern Fiel	3.1	1.7	0.0	93.2%	0.0	0.1	-69.7%	●
Hungary	1.6	1.7	0.0	0.0%	0.3	0.4	-28.7%	●
Australia	0.8	1.4	0.0	-54.3%	0.0	0.0	-46.4%	
USA HORT Horticultu	1.2	1.3	0.0	-31.1%	0.0	0.1	-83.3%	
Bulgaria	1.0	1.0	0.0	-61.6%	0.0	0.0	0.0%	
USA PP Professional Pi	1.5	0.9	0.0	-100.0%	0.0	0.9	-100.0%	
Russia	1.0	0.9	0.0	72.5%	0.2	0.0	686.0%	
Ukraine	0.8	0.8	0.0	59.3%	0.1	0.0	0.0%	
Greece	0.7	0.7	0.0	12.6%	0.1	0.1	-16.7%	
Serbian Montenegro	0.5	0.6	0.0	12.5%	0.6	0.4	16.7%	
France	0.7	0.5	0.0	17.7%	0.1	0.2	-58.4%	
Mexico	0.5	0.5	0.0	-0.1%	0.0	0.0	0.0%	
Romania	0.3	0.4	0.0	0.0%	0.0	0.2	-84.1%	
Argentina	0.3	0.3	0.0	-14.3%	0.0	0.0	-73.9%	
Others	2.1	1.9	-	64.9%	0.2	0.9	-75.1%	
Total	18.1	17.5	-	-7.3%	1.9	3.8	-54.5%	●

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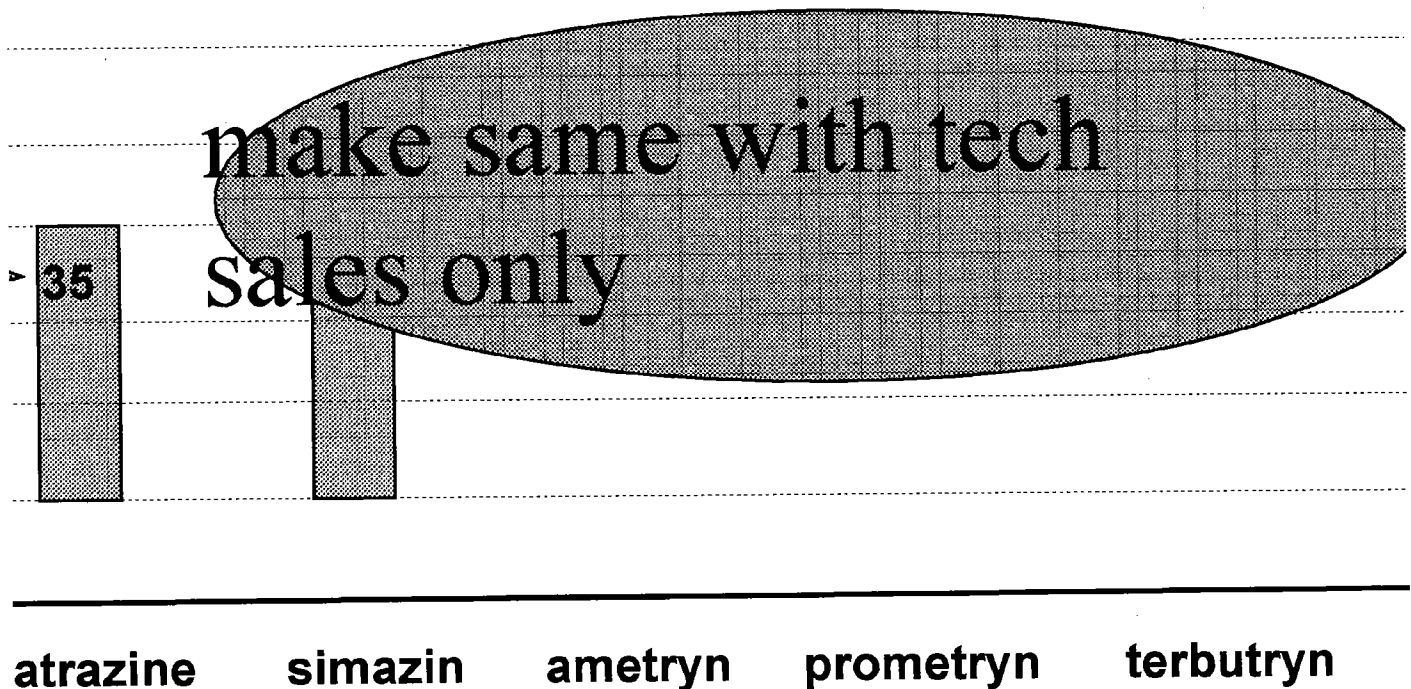
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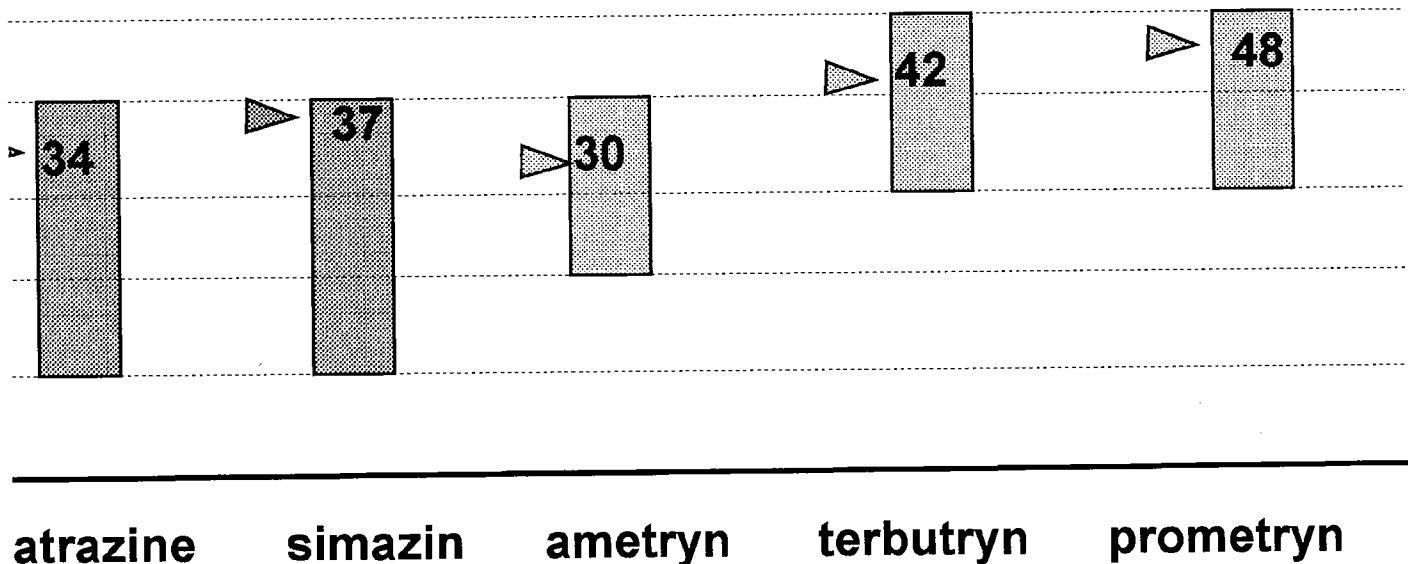
Actual (average YTD Jan-Sept 2004)
Global Gross Profit
for Syngenta's triazines as lead a.i.
ofit in %



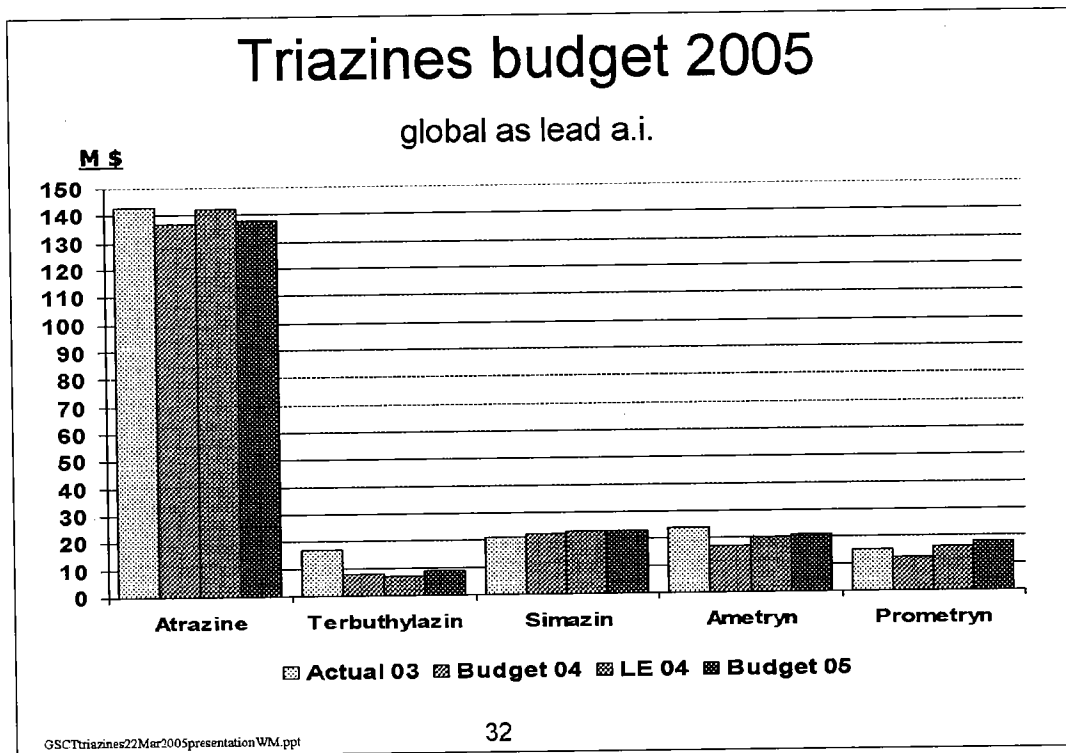
* note: 40 % of sales of lead a.



Actual (average YTD Jan-Dec 2004 Global Gross Profit for Syngenta's triazines as lead a.i. ofit in %



* note: 40 % of sales of lead a.



**Status of atrazine supply to third parties outside US
= Basel HQ industrial sales**

Company	type of contract, status	territories	total volumes per year
Monsanto	old supply agreement from 1996 for EU for use in mixtures formulated by Monsanto. Prices for 2005 under revision	Europe + CH + Norway Eastern Europe, CIS Africa, Middle East	100-200 tons
Bayer	old supply agreement from 1999 for mixtures with flufenacet for EU	France, Germany	60 – about 200 tons
	would be interested to discuss agreement for higher volume favourable price conditions	new supply agreement signed for USA	300-350 tons (incl 100 tons from USA)
BASF	No supply agreement for EU. Price for France revised for 2005	France, Germany new supply agreement signed for USA	100-200 tons (=max 450'000 lb)
	New global supply agreement proposed.		2500-4500 tons
Oxon	swap of atr with tba+propazine was envisaged in sommer 2003 but failed		2000 tons tba+1000tons propazine against 3200-3500 tons atrazine
Agan	no interest (last contact Oct 20, 04) situation may change with new management in 2 years		

**Status of terbuthylazine supply to third parties outside
US = Basel HQ industrial sales**

Company	type of contract, status	territories	total volumes per year
Monsanto	none. Monsanto purchases tba from Oxon for mixtures of acetochlor+tba and alachlor+tba		
Bayer	New supply agreement for Euro 25 being negotiated now (mainly for mixtures with flufenacet). No agreement on supply price yet.	EU 25 countries	100 - 200 tons /
BASF	New supply agreement for EU has been signed in Sept 2004 (mainly for mixtures with bentazon, dimethenamid)	Germany, Austria, CH, UK, Netherlands, Belgium, IRL, Denmark, Luxemburg, Greece, Italy, Spain, Portugal, Hungary, Poland, Czechia, Slovakia, Slovenia	150 - 250 tons
Oxon	no interest		
Agan	no interest (last contact April 2004)		

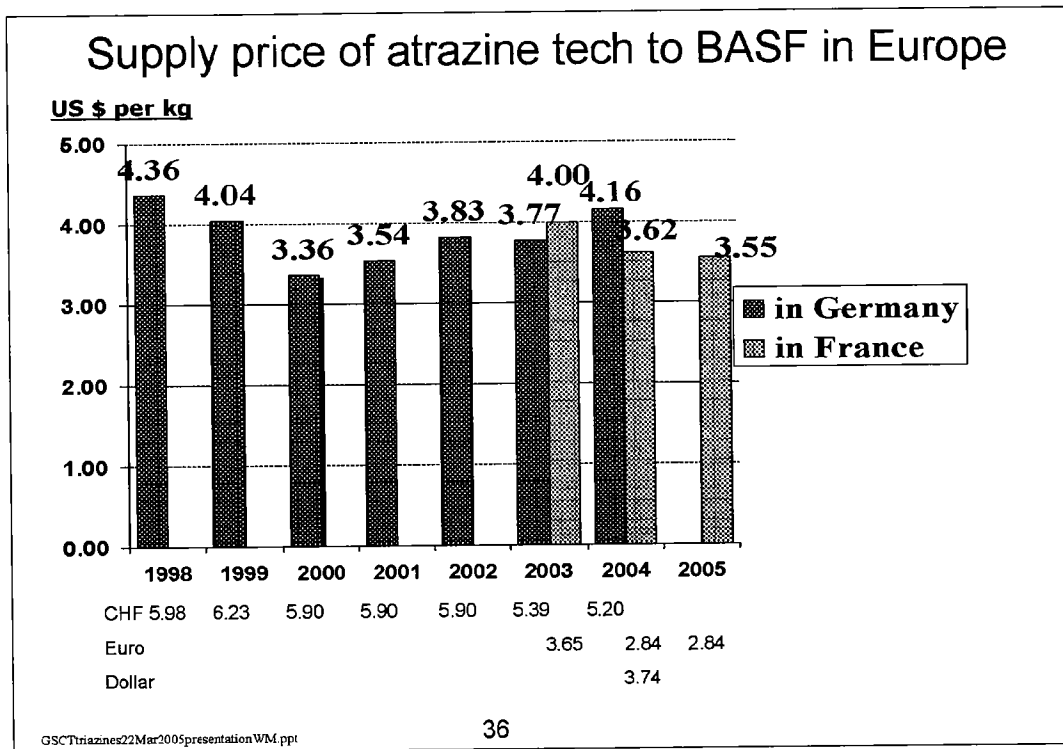
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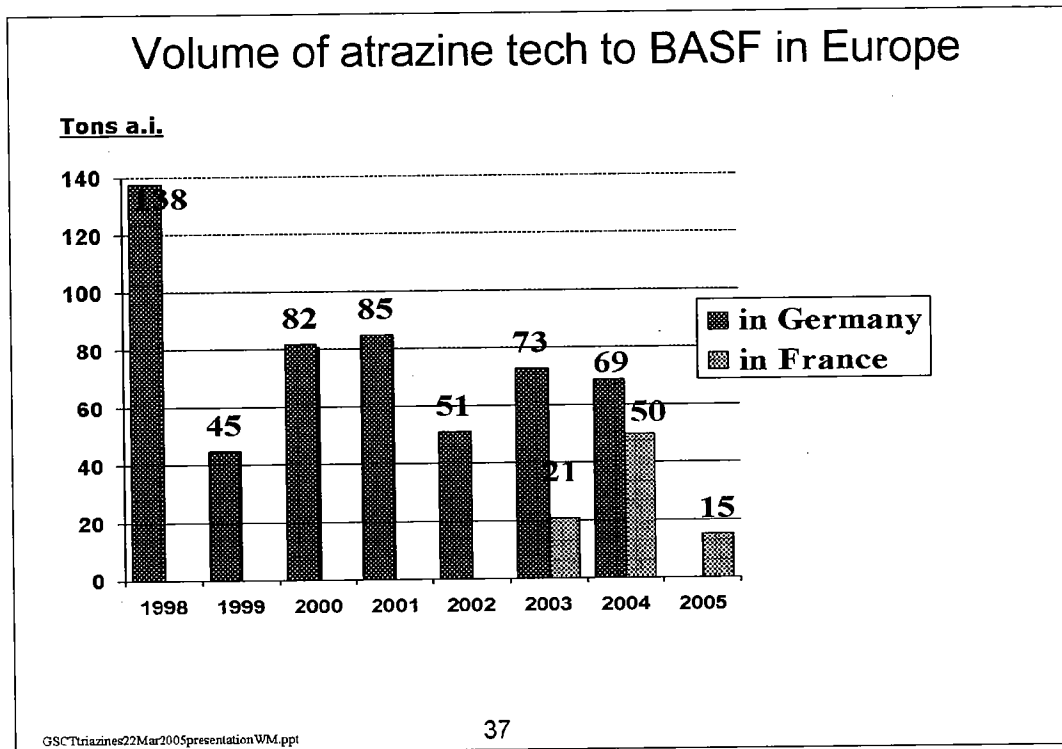
Global strategy for triazines tech sales

Atrazine	Terbuthylazin	Simazin	Ametryn	Prometryn
Go for volumes	Maximise the value	Go for volumes	keep the value	keep the value
be competitive with supply price	Keep premium price of tech as long as we can	be competitive with supply price		
reduce the margin	maintain a good margin	reduce the margin	keep a minimum 30% GP	keep a minimum 30% GP

check if different figure for tech and for formulated

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US customers of atrazine tech and supply price in 03 and 04

Customer	2003 Atrazine Technical			A.I. Volume	2004 Projections	
	A.I. Volume	Revenue	Average Price		Revenue	Average Price
Agrilience	6'696'992	\$8888'657	\$1.33	6'972'257	\$9'168'518	\$1.32
BASF	5'332'000	\$9064'400	\$1.70	4'880'116	\$8052'191	\$1.65
Bayer	178'575	\$312'506	\$1.75	200'000	\$350'000	\$1.75
DuPont	1'492'960	\$2'612'680	\$1.75	0	\$0	\$0.00
Gro Tech	11'904	\$29'760	\$2.50	10'956	\$24'103	\$2.20
Monsanto	12'235'328	\$21'292'288	\$1.74	12'900'000	\$22'575'000	\$1.75
Sunniland	42'656	\$89'578	\$2.10	83'003	\$166'006	\$2.00
Scotts	791'616	\$1'676'282	\$2.12	735'617	\$1'544'796	\$2.10
Van Diest	1'535'616	\$2'125'122	\$1.38	1'106'709	\$1'527'258	\$1.38
Dow	1'533'632	\$2'683'856	\$1.75	1'500'000	\$2'625'000	\$1.75
Totals	29'851'279	\$48'775'129	\$1.63	28'388'658	\$46'032'873	\$1.62

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Overview Global Atrazine Prices

US\$ / kg ATR tech or formulated (2002-2004)

		Agan	Oxon	China (various)	Atanor (ARG) Albough (USA)	DOW (Sanachem)	SYT
USA	ATR-tech	2.84	2.82	-	2.88	3.23	3.48-3.61
	ATR-formul.	3.85	3.83	-	3.92	-	4.3-4.4
AUS	ATR-tech	3.01-3.58	3.33-4.21	2.1-2.4	-	-	3.36-3.8
TH	ATR-formul.	4.4-4.5	4.4-4.7	3.8	-	-	4.85
ARG BR	ATR-formul.	-	-	3.8-4.0	4.0	4.4	4.74-4.94
		5.3	4.62	-	-	-	4.98-5.40
South Africa	ATR-tech			2.1			3.35-3.51
	ATR-formul.			3.53			4.51-4.72
Global Ranges	ATR-tech	2.84	2.82	2.1-2.4	2.88	3.23	3.35-3.8
	ATR-formul.	3.01-5.3	3.33-4.7	3.8-4.0	3.92-4.0	4.4	4.3-5.4

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US customers of atrazine tech and supply price

Customer	Syngenta volumes in lb	price / lb	\$	Competitive volumes in lb	price / lb	\$	total volumes in lb	Syngenta share in % AI \$
MONSANTO	16,200,000	\$1.67	27,054,000	5,100,000	\$1.50	7,650,000	21,300,000	75.1 80
BASF	6,600,000	\$1.70	11,220,000	7,000,000	\$1.55	10,850,000	13,600,000	48.5 50.8
DOW	1,400,000	\$1.75	2,450,000	7,000,000	\$1.47	10,290,000	8,400,000	16.6 19.2
BAYER	600,000	\$1.75	1,050,000	7,500,000	\$1.36	10,200,000	8,100,000	8 9
TOTAL	24,800,000	\$1.68	41,774,000	26,600,000	\$1.47	38,990,000	51,400,000	48.2 51.7

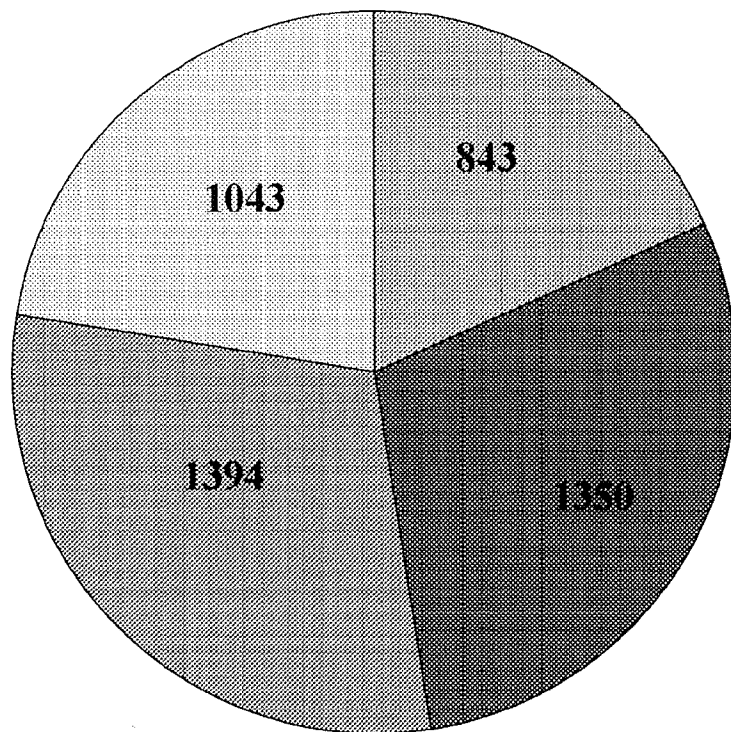
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Chinese atrazine exported from China to different regions from Jan-June 2004 in metric tons a.

4536 tons

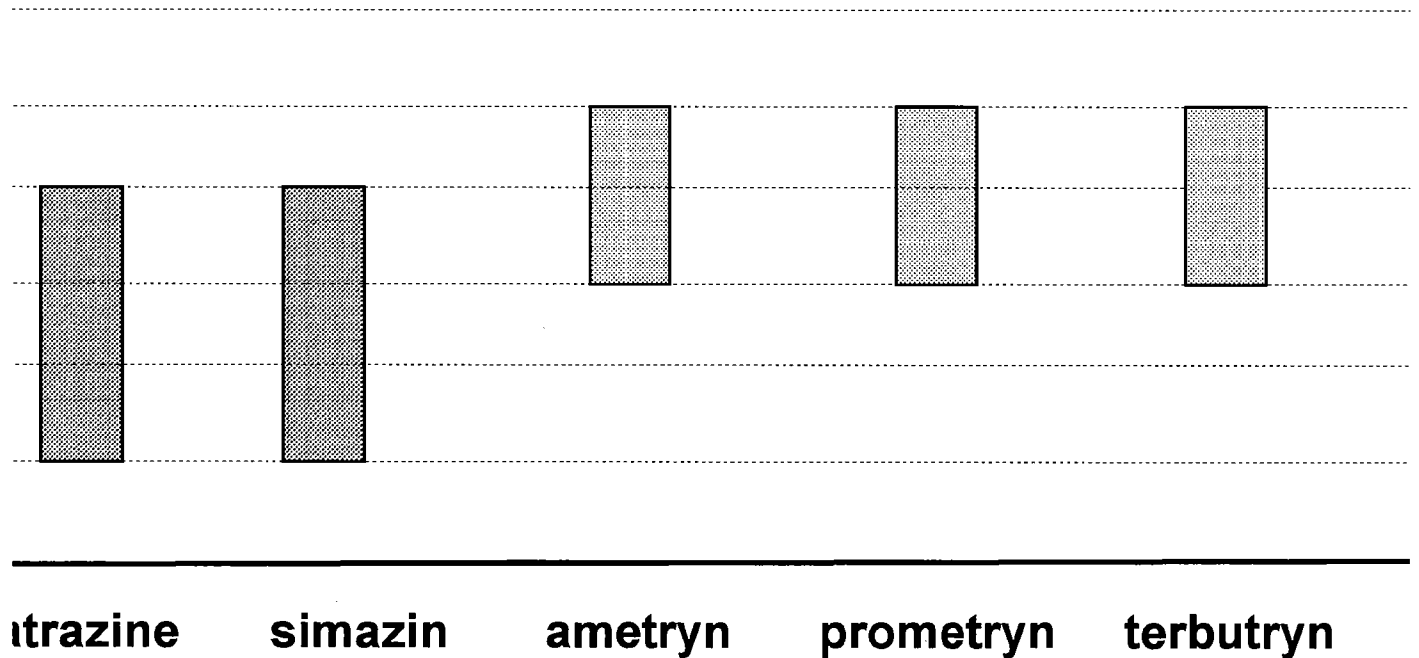


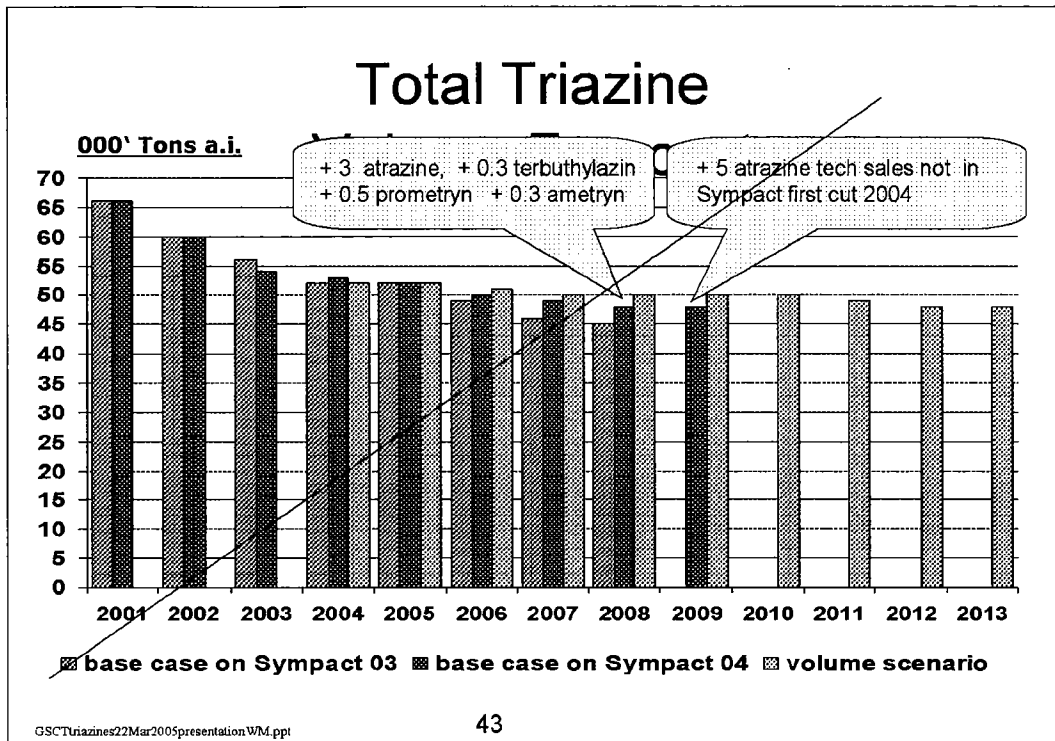
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Global Gross Profit target for Syngenta's triazines

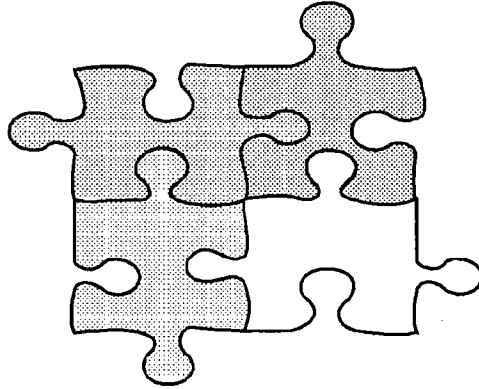
Profit in %





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